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## Netherlands

## Oilseeds and Products

## Update of the Peanut Market in Benelux 2004

**Approved by:**

Roger Wentzel  
U.S. Embassy, The Hague

**Prepared by:**

Bob Flach

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**Report Highlights:**

With more than 250,000 MT in 2002, Benelux is one of the world's main peanut importers. This report gives an overview of the peanut trade, processing and packaging sector in Benelux

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Includes PSD Changes: No  
Includes Trade Matrix: No  
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[NL]

**Table of Contents**

<b>I. Trade Overview</b>	<b>3</b>
<b>II. Manufacturing / Processing Sector</b>	<b>4</b>
Traders, Brokers and Transport Services	4
Importers, Processors and Packagers	4
Trends in Processing	5
Principal Factors Affecting Trade	6
By-Products	7
<b>III. Potential Contacts</b>	<b>8</b>
Traders, Brokers and Transport Services	8
Importers, Processors and Packagers	8
Two peanut processors were identified in Belgium:	9
Sources for Price Information	10
Sources for Trade Information	10

## I. Trade Overview

Table 1. Dutch Trade and Consumption of Peanuts (MT).						
	1997	1998	1999	2000	2001	2002
<b>Production</b>	0	0	0	0	0	0
<b>Import Peanuts Raw</b>	221,069	200,705	152,897	171,949	224,112	234,979
US	53,130	44,608	31,355	59,339	35,571	67,252
Argentina	85,966	84,588	75,431	50,184	95,600	67,739
China	49,764	36,119	31,186	40,933	66,002	70,169
<b>Import Peanuts Roasted</b>	323	951	562	807	684	2,984
<b>Import P. Prep./Packed</b>	3,257	2,715	2,982	4,310	5,687	4,289
<b>Import Peanuts Total</b>	224,649	204,371	156,441	177,066	230,483	242,252
<b>Crush (MVO)</b>	8,020	8,232	9,363	10,451	8,271	8,514
<b>Domestic Human Cons. *</b>	50,000	50,000	50,000	50,000	50,000	50,000
<b>Export Peanuts Raw</b>	102,365	94,159	56,164	66,445	115,400*	122,900*
<b>Export Peanuts Roasted</b>	5,783	2,485	4,256	5,069	9,875	13,418
<b>Export P. Prep./Packed</b>	21,239	19,971	19,620	20,470	21,941	22,417
<b>Export Other Processed P.#</b>	37,242	29,524	17,038	24,631	25,000	25,000
<b>Export Peanuts Total</b>	166,629	146,139	97,078	116,615	172,216	183,735

Source: Based on figures of the Product Board for Margarine, Fats and Oils (MVO) and World Trade Atlas.

\*Estimate by OAA The Hague. #Export Other Processed Peanuts; Estimate by OAA The Hague. Due to processing these nuts are exported under other, non-peanut, HS code categories.

In The Netherlands, there is no production of peanuts. The Netherlands is, however, an important importer. With 16 percent of world trade, The Netherlands is the second largest peanut importer in the world next to Indonesia. Dutch peanut imports consist mainly of raw peanuts imported from third countries (the U.S., Argentina and China) of which about 95 percent are shelled.

Dutch peanut imports increased from 152,900 MT in CY1999 to 235,000 MT in CY2002. According Dutch trade sources, this increase is partly due to transshipments destined for the UK market through Rotterdam. In CY2001, importers decided to increase peanut imports through The Netherlands because Rotterdam's port has cold storage facilities available where the peanuts can be stored for aflatoxin testing. Trade sources indicate that with the anticipated tightening of EU directives for aflatoxin testing, the volume of transshipments through Rotterdam could increase further. Besides the UK, raw peanut imports are also transshipped to other EU member states, mainly Germany and France. Dutch exports of roasted, prepared and packed peanuts are mainly distributed to the French, German and Belgian markets.

A larger volume of Chinese peanuts was another reason for the increased Dutch peanut imports in 2001 and 2002 (see table). According to the Dutch trade, Chinese peanuts must be imported within half a year of harvest. Chinese peanuts are of low and irregular quality, and need to be segregated for crushing, bird feed and for human consumption. Chinese peanuts are imported through Rotterdam because of the wide range of facilities and processors available in the vicinity of the port.

<b>Table 2. Belgian Trade and Consumption of Peanuts (MT).</b>					
	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>
<b>Production</b>	0	0	0	0	0
<b>Import Peanuts Total</b>	14,103	16,488	18,887	28,587	29,000
<b>Crush</b>	0	0	0	0	0
<b>Domestic Human Cons.</b>	7,079	8,804	7,677	7,753	8,000
<b>Export Peanuts Total</b>	7,024	7,684	11,210	20,834	21,000

Source: Based on figures of the National Bank

In 2002, Belgium imported 28,500 MT of various peanuts, of which about 13,000 MT are intra-EU imports, mainly from The Netherlands. About 21,000 MT of peanuts were re-exported, including 9,000 MT to The Netherlands and 6,400 MT to Germany.

## **II. Manufacturing / Processing Sector**

### **Traders, Brokers and Transport Services**

The most important peanuts traders in The Netherlands are: Nutco (Weesp), the Bohemia Nut Company (Rotterdam), Jas B.V. (Amstelveen) and Nederco B.V. (Roosendaal).

Dutch forwarding and warehousing companies involved with peanut trade are: C. Steinweg Handelsveem B.V. (Rotterdam), Tybex Warehousing B.V. (Rotterdam) and Vebero B.V. (Oosterhout)

In addition, one major Dutch broker is involved in the international peanut trade: The Klinkenberg Group (Naarden)

### **Importers, Processors and Packagers**

An important part of Dutch peanut imports are processed and/or packed for the consumer market (see table 1). Because of mergers and concentration, only a few nut packaging companies are left in The Netherlands. Based on trade sources, the three major peanut processors and packagers in The Netherlands and the EU are: Masterfoods, The Nut Company and Duyvis. These three companies reportedly represent about 40 to 50 percent of peanut processing and packaging in the EU.

-Masterfoods (Veghel) in The Netherlands has two sites. One site is located near Rotterdam and mainly produces sauces. The other site is based in Veghel and produces and markets confectionery products which include well known brands such as Mars, Bounty, Twix, Snickers, Milky Way and Maltesers.

-Granaria Holding is a conglomerate, which owns The Nut Company. The ownership is 50 percent Dutch and 50 percent German. The Nut Company was created early in 2000 when Felix Snack Group GmbH, Ultje GmbH, and the Granaria Food Group B.V. consolidated their nut operations. The company has production units across Europe and is the number one nut packer in The Netherlands and in Europe. Important brands within the company are Jack Klijn (Dutch), Jack Benoit (French), Felix Gourmet (Polish) and Ultje (German). The Nut Company mainly imports from sources other than the U.S., and is specialized in snack nuts, peanut butter, crackers and ingredients. The head office of The Nut Company is located in Arnhem, The Netherlands. Imko (Doetichem) is an operating company of The Nut Company.

Through Imko Ingredients, the company is a supplier of nuts and nut ingredients for the European Food Industry.

Since 2000, The Nut Company has utilized a central supply chain through Rotterdam. Peanuts are transshipped through Rotterdam to France, Germany and Poland. This centralization has been one of the causes of much of the increase in peanut traffic through Rotterdam since 2001.

-Duyvis (Zaandam) is a Sara Lee company and is specialized in snack nuts. Duyvis imports a significant volume from the U.S.

Other major processors include:

-Van den Bergh Nederland (Rotterdam) is a subsidiary of Unilever and an important producer of peanut butter in The Netherlands.

-Van Dijk Food Products (Lopik) is an important producer of peanut sauces and peanut butter in The Netherlands.

-King Nuts & Raaphorst B.V. (Bodegraven) is an important packager of peanuts and tree nuts in The Netherlands.

Two peanut processors were identified in Belgium:

Plantation Snack's NV (Wespelaar) and Menken N.V. (Aartselaar). Both Belgian processors import through Dutch traders in Rotterdam. The large food companies located in Belgium, including Unilever, Duyvis (Sarah Lee) and Masterfoods import peanuts and products from their Dutch processing plants.

Two processors were also identified in Luxembourg:

Ireco S.A. (Steinsel) and Zerno S.A. Zerno is a processing company owned by of Maxkiene GmbH in Germany. Both Ireco and Zerno import peanuts through Antwerp. Zerno imports annually about 4 thousand tons of peanuts, mainly from Argentina.

### **Trends in Processing**

The use of peanuts by Dutch industry is stable and estimated at about 80,000 MT annually (Dutch Peanut Council). This includes Dutch consumption of snack peanuts, estimated at about 20,000 MT (Product Board for Horticulture), and consumption of peanuts as ingredients such as in peanut butter and snicker bars, estimated at about 30,000 MT (OAA estimate). About 25,000 MT is used by the Dutch industry as ingredients and then exported in food or feed products (OAA estimate). A significant but unknown volume is reportedly exported as bird feed. The main Dutch importers do not foresee any change in the volume of peanuts processed in The Netherlands. Changes are, however, anticipated in the origin of the peanuts and the entry point for import into the EU.

## Principal Factors Affecting Trade

Table 3. Origins of the Dutch Peanut Imports (Metric Tons)						
	1997	1998	1999	2000	2001	2002
<b>Import Peanuts Raw</b>	221,069	200,705	152,897	171,949	224,112	234,979
Non EU Orgins	214,747	195,121	147,272	164,817	219,457	231,813
US	53,130	44,608	31,355	59,339	35,571	67,252
US (%)	24	22	21	35	16	29
Argentina	85,966	84,588	75,431	50,184	95,600	67,739
China	49,764	36,119	31,186	40,933	66,002	70,169
<b>Import Peanuts Roasted</b>	323	951	562	807	684	2,984
Non EU Orgins	272	24	201	174	552	1,620
<b>Import P. Prep./Packed</b>	3,257	2,715	2,982	4,310	5,687	4,289
Non EU Orgins	1,765	1,700	1,742	1,729	2,946	2,323
<b>Import Peanuts Total</b>	224,649	204,371	156,441	177,066	230,483	242,252

Source: Based on figures of the Product Board for Margarine, Fats and Oils (MVO) & World Trade Atlas

Table 4. Origins of the Belgian Peanut Imports (Metric Tons).					
	1998	1999	2000	2001	2002
<b>Import Peanuts Total</b>	14,103	16,488	18,887	28,587	29,000
Non EU Orgins	5,175	6,941	9,458	15,657	17,000
US	3,558	2,969	4,411	10,373	10,500
US (%)	25	18	23	36	36

Source: Based on figures of the National Bank

The majority of the Dutch peanut imports are shipped as shelled, raw peanuts from the U.S., Argentina and China. Over the past six years, Argentina has been the main supplier of peanuts to The Netherlands.

For the use of peanuts for private label products and as ingredient, peanuts produced in Argentina and China are preferred. Trade sources indicated that the quality of Chinese peanut imports improves if they are carefully selected. The aflatoxin level remains, however, a problem in shipments of Chinese peanuts. Trade sources have the opinion that, with stricter EU legislation on aflatoxin, US peanuts could be increasingly preferred above other origins. The origin testing on aflatoxin by the U.S industry is mentioned as a major factor in the decision-making on origin.

Up to 40,000 MT of peanuts are reportedly re-exported from Rotterdam as bird feed (principally Chinese peanuts), mainly shipped to the UK. According to the Dutch trade, Chinese peanuts must be imported within half a year of harvest. Chinese peanuts are regarded as being of low and irregular quality, and need to be segregated for crushing, bird feed and for human consumption.

Trade sources indicate that the quality of U.S. peanuts vary substantially by growing region and variety. U.S. peanuts are bought for the Dutch market because of their large size, crunchiness, sweet taste, low incidence of aflatoxin and long shelf life. Some trade sources, however, indicated that if the price differential is too big, U.S. peanuts could easily be

replaced by peanuts from other sources. It should be noted that for some peanuts produced in Texas, serious quality problems were mentioned by importers due the high temperature levels during the growing period. Besides quality issues, another reason to buy U.S. peanuts is the shorter shipping time (two weeks versus three to four weeks for peanuts shipped from Argentina and about six weeks for peanuts from China).

### By-Products

<b>Table 5. Dutch Trade, Production and Consumption of Peanut Oil</b> (Metric Tons).						
	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>
<b>Import Oil (MVO)</b>	15,653	12,393	19,258	10,722	7,919	7,896
<b>Oil Production (MVO)</b>	1,370	1,482	1,734	2,383	1,518	2,067
<b>Oil Yield (calculated)</b>	0.17	0.18	0.19	0.23	0.18	0.24
<b>Oil Processing (MVO)</b>	7,635	6,053	10,114	8,015	6,511	5,360
<b>Oil Consumption (MVO)</b>	5,293	5,118	6,309	6,071	5,208	5,711
<b>Export Oil (MVO)</b>	9,813	6,628	12,229	6,558	3,096	5,871

Source: Based on figures of the Product Board for Margarine, Fats and Oils (MVO)

<b>Table 6. Dutch Trade, Production and Consumption of Peanut Residues</b> (Metric Tons).						
	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>
<b>Import Residue</b>	20,294	49,084	23,536	15,327	1,702	506
<b>Residue Prod. (MVO)</b>	6,650	6,842	7,604	7,882	6,753	6,537
<b>Residue Cons. (calc.)</b>	6,253	29,384	23,586	16,651	1,926	1,785
<b>Export Residue</b>	20,691	26,542	7,554	6,558	6,529	5,258

Source: Based on figures of the Product Board for Margarine, Fats and Oils (MVO) and World Trade Atlas

With an annual crush fluctuating between 8,000 and 11,000 MT, The Netherlands is one of the largest peanut crushers in the world. The crushing of peanuts is conducted solely by Obertop B.V. (Oudendijk). The peanuts selected for crushing are mainly lots that are rejected for human consumption. Because of the inconsistent and often low quality of these peanuts, the oil yield is relatively low. The peanut oil is reportedly refined and used for human consumption, and residues are used in animal feed. Peanut shells are reportedly not used for feeding because of the risk of high aflatoxin levels. At the moment, energy companies are reportedly investigating the possibility to use the shells as combustion material.

### III. Potential Contacts

#### Traders, Brokers and Transport Services

The most important peanut traders in The Netherlands are:

**Nutco**

Nijverheidslaan 1E  
1382 LE Weesp  
The Netherlands  
Phone: +31 (0)294 484943  
Fax: +31 (0)294 482918

**Bohemia Nut Company**

Westerstraat 46  
3016 DH Rotterdam  
The Netherlands  
Phone: +31 (0)10 4126099  
Fax: +31 (0)10 4049109  
E-mail: [a.bril@bohemianutcompany.com](mailto:a.bril@bohemianutcompany.com)

**Jas B.V.**

Burg Haspelsln 11  
1181 NB Amstelveen  
The Netherlands  
Phone: +31 (0)20 6436412  
Fax: +31 (0)20 6432127  
E-mail: [info@jastrading.com](mailto:info@jastrading.com)  
Internet: [www.jastrading.com](http://www.jastrading.com)

**Nederco B.V.**

Postbus 195  
4700 AD Roosendaal  
The Netherlands  
Phone: +31 (0)165 524747  
Fax: +31 (0)165 524740  
E-mail: [nederco@tip.nl](mailto:nederco@tip.nl)

**Brokers:****The Klinkenberg Group**

Nieuwe Haven 25  
1411 SG Naarden  
The Netherlands  
Phone: +31 (0)35 6947822  
Fax: +31 (0)35 6948269

#### Forwarding and Warehousing Services

**C. Steinweg Handelsveem B.V.**

Parmentierplein 1  
P.O. Box 1068  
3000 BB Rotterdam  
The Netherlands  
Phone: +31 (0)10 487 93 94  
Fax: +31 (0)10 487 93 10  
Internet: [www.steinweg.com](http://www.steinweg.com)

**Tybex Warehousing B.V.**

Stadionwg 31/D  
3077 AP Rotterdam  
The Netherlands  
Phone: +31 (0)10 4824622  
Fax: +31 (0)10 4827471

**Vebero B.V.**

Rederywg 30  
4906 CX Oosterhout NB  
The Netherlands  
Phone: +31 (0)162 437777  
Fax: +31 (0)162 437711

#### Importers, Processors and Packagers

**Masterfoods B.V.**

Taylorweg 5  
5466 AE Veghel  
The Netherlands  
Phone: +31 (0)413 383582

**The Nut Company B.V.**

(European head office)  
Bedrijvenpark IJsseloord 2  
Meander 601  
6825 ME Arnhem

Fax: +31 (0)413 351670  
E-mail: luc.behrens@eu.effem.com

**Duyvis Production B.V.**

D. Sonoyweg 17  
1509 BR Zaandam  
The Netherlands  
Phone: +31 (0)75 6514707  
Fax: +31 (0)75 6514877  
E-mail: rkuis@duyvis.com  
Internet: [www.duyvis.com](http://www.duyvis.com)

**Van Dijk Food Products**

2e Industrieweg 8  
3411 ME Lopik  
The Netherlands  
Phone: +31 (0)348 558911  
Fax: +31 (0)348 558740

**Obertop B.V.**

Dorpswg 78  
1631DH Oudendyk NH  
The Netherlands  
Phone: +31 (0)229 541213  
Fax: +31 (0)229 543439  
Email: obertopbv@hetnet.nl

The Netherlands  
Phone: +31 (0)26 3840153  
Fax: +31 (0)26 3840151  
E-mail: h.zijlmans@thenutcompany.com  
Internet: [www.thenutcompany.com](http://www.thenutcompany.com)

**Van den Bergh Nederland**

(subsidiary of Unilever)  
Nassaukade 3  
3071 JL Rotterdam  
The Netherlands  
Phone: +31 (0)10 439 42 04  
Fax: +31 (0)10 439 46 50

**King Nuts & Raaphorst B.V.**

Spanjeweg 4  
2411PX Bodegraven  
The Netherlands  
Phone: +31 (0)172 632222  
Fax: +31 (0)172 632233

**Two peanut processors were identified in Belgium:****Plantation Snack's NV**

Nieuwstraat 14C  
B-3150 Wespelaar  
Belgium  
Phone: +32 (0)16 60 05 31  
+32 (0)16 60 05 33  
Fax: +32 (0)16 60 26 22  
E-mail: [plantationsnacks@pophost.eunet.be](mailto:plantationsnacks@pophost.eunet.be)

**Menken N.V.**

Boomsesteenweg 38  
B-2630 Aartselaar  
Belgium  
Phone: +32 3 870 89 60  
Fax: +32 3 877 89 89

**Two processors were also identified in Luxembourg:****Ireco S.A.**

Rue J.F. Kennedy  
L-7327 Steinsel  
Luxembourg  
Phone: +352 33 17 22  
Fax: +352 33 17 25  
E-mail: [office@ireco.lu](mailto:office@ireco.lu)

**Zerno S.A.,**

Processing company of Maxkiene GmbH –  
Germany

## Sources for Price Information

There is no official price quotation for peanuts in The Netherlands or other European countries.

Sources for peanut price information are:

- Reuters. Provides prices of peanuts on C & F NW
- The Klinkenberg Group reports prices for nuts in a weekly market report for nuts, which can be obtained on subscription on <http://www.klinkenberggroup.com>. These prices are reportedly used by banks and insurance companies to insure shipments.
- Oil World.
- The Public Ledger.

## Sources for Trade Information

### Product Board for Margarine, Fats and Oils

Ampereln 4d  
2289CD Ryswyk ZH  
The Netherlands  
Phone: +31 (0)70 3195195  
Fax: +31 (0)70 3195196

### Product Board for Horticulture

P.O. Box 280  
2700 AG Zoetermeer  
The Netherlands  
Phone: +31 (0)79 3470707  
Fax: +31 (0)79 3470404  
E-mail: [pt@tuinbouw.nl](mailto:pt@tuinbouw.nl)  
Internet: [www.tuinbouw.nl](http://www.tuinbouw.nl)

### Netherlands Association for the Trade in Dried Fruit, Spices and allied Products (NZV)

Bezuidenhoutseweg 82  
2594 AX The Hague  
The Netherlands  
Phone: +31 (0)70 3833011  
Fax: +31 (0)70 3475253  
E-mail: [secretariaat@nzv-org.nl](mailto:secretariaat@nzv-org.nl)  
Internet: [www.zuidvruchten.nl](http://www.zuidvruchten.nl)

### Dutch Peanuts Council

Reitseplein 1  
5004 JB Tilburg  
The Netherlands  
Phone: +31 (0)13 5944239  
Fax: +31 (0)13 5944747  
E-mail: [d.p.c@wispa.nl](mailto:d.p.c@wispa.nl)

### Research Center for Snacks & Confectionary (SSZ)

Laan van Vollenhove 3217  
3706 AR Zeist  
The Netherlands  
Phone: +31 (0)30 6950304  
Fax: +31 (0)30 6961305